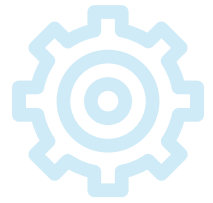


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The Manufacturer's Guide

# Simplify Partner Engagement





# Introduction

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In a recent [survey](#), 80% of B2B executives said their channel partner programs weren't effective. That is a big problem for manufacturers, where you depend on a network of capable, productive channel partners to succeed. Distributors, manufacturers' representatives, dealers, and resellers are essential for expanding into new markets and expanding your presence in existing ones. In its latest Buyers' Journey Survey, [Forrester found](#) that channel partners or indirect routes to market were used by nearly 70% of over 10,000 buyers to make purchases, instead of buying directly from the supplier.

Your partners build deep relationships with their customers. And their knowledge of buyers' needs, wants, and frustrations helps them drive repeat business. Maximizing transparency in your relationship supports that effort. But it also provides you with invaluable insights about your customers and market demand.

Gaining that transparency pays huge, mutually-beneficial dividends, but you must first establish trust with partners before they will share their information and collaborate effectively with you. A big step in building this trust is to make it easy for partners to work with you. But what are the challenges of making that happen, and how can you overcome those challenges?



# Challenges of Delivering for Partners

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To address ineffective channel partner programs, manufacturers need to answer four questions:

How can I drive more business, loyalty, and dedication through my channel?

How can I create more data sharing and transparency with my partners?

How can I deliver excellent customer experiences seamlessly through my channel?

How can I get closer to my end-customers while still supporting my channel?



Unfortunately, the answers don't come easily, for several reasons:

## **Lack of Cohesive Partner Management**

Manufacturers work with hundreds, if not thousands, of partners. But they often lack an overarching program for managing them. That makes it nearly impossible to work together to consistently market, sell, and provide customer service.

## **Siloed Systems and Fragmented Processes**

Manufacturers typically connect with partners through file sharing, email engagement, and a maze of separate web portals that are infrequently updated and difficult to navigate. Information is often presented in spreadsheets or static reports. This makes it hard for partners to find accurate details about products, orders, deliveries, available inventory, pricing, etc. And siloed systems on the manufacturer's side make things even harder.



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Nanda Chitrala, Salesforce Director of Industry Product Strategy and Solutions, explains, “Manufacturers’ lack of formal partner programs leaves new partners wondering how to become a dealer for a certain set of products, how to get authorized, and how to get onboarded. Meanwhile, established partners struggle to find information about new products or current marketing campaigns, or how to get help with service inquiries. Partners also need an easy path for one of their main pain points: checking their order status or increasing an order.”

In addition, incentive programs are often complex and manually administered. This provides partners with little visibility into current incentive progression. By the time they track down their attainment details, it may be too late to take advantage of the incentive. That makes the manufacturer’s incentive program significantly less impactful.

### Poor Communication Channels

Partner portals are often designed to push information from manufacturers to dealers and distributors. There’s limited opportunities for two-way communication. This reduces both the manufacturer’s and partner’s ability to identify and respond to customer needs and commerce needs in a timely fashion. That can mean lost business.

### Conflict and Competition Within the Partnership Network

Conflicts of interest, or the threat of such conflicts, can make gathering partner sales data difficult. If partners fear direct sales competition from manufacturers, they may be reluctant to share customer information. Moreover, distributors often carry competing products from other manufacturers – and they’ll often choose to sell the product of the manufacturer who is easier to work with. Mark Schmidt, Salesforce Manufacturing Solutions and Strategy explains, “Your customers have other options. Don’t give them good reasons to put alternatives on their shelves. Being responsive, transparent, and providing compelling financial incentives, all help keep them loyal.”





# Making it Easy for Partners

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To simplify partner engagement and drive more sales, you have to reduce the friction generated by the many challenges we've discussed. To do that you'll need a cohesive, responsive partner platform with easy access to critical information and the real-time capabilities to act on it.

That means moving from manual, disconnected processes and clunky legacy systems to personalized, anywhere/anytime, modern experiences by harnessing data and integrating it with a customer relationship management (CRM) platform with AI capabilities. Automation and self-service capabilities boost partner productivity, and help lower your cost-to-serve. And transparency into customer data and collaboration on forecasting and business tracking drive exponential mutual benefit.

This guide outlines six phases to help you unleash the full power of your partnerships. Read on to get your partner journey started.



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## 1. Design A Winning Partner Program

Partners use a variety of tools for everything from scheduling, to co-selling, to warranty status. Putting these capabilities together in one place will increase efficiency.

How do you do that? The success of your program depends on an overarching vision to guide every individual decision. Think through your end goals for the program, your tiering structure, and your incentives/benefits for different tiers. Then outline ongoing and ad hoc communications strategies to support engagement.

There's no question that unifying all your customer data across customer engagement channels, systems, and processes is advantageous. It gives you a 360-degree view of your customers that improves employee productivity, and helps you predict and react to future needs. This enables you to provide better service across all business units and regions.

Beyond the improvements you'll see within your organization, empowering your partners with access to your platform can reap even more benefits such as increased sales or a boost in loyalty. Set up dashboards based on key performance indicators and analytics to showcase status and progress. Give them a direct path to whatever information they need to succeed. Remember: transparency is the name of the game.



**Nanda Chitralla**  
Salesforce Director  
of Industry Product  
Strategy & Solutions

### Expert Tip: Efficiency

“Make it easy for partners by setting up a one-stop shop where they can not only find all the information they need, but enter and track orders, obtain fast and accurate price quotes, and connect with their customers to provide updates and servicing.”



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## 2. Build Your Partner Ecosystem

Once you've designed your program, get partners on track quickly with simplified recruiting, onboarding, and training processes:



**Mark Schmidt**  
Salesforce Manufacturing  
Industry Solutions & Strategy

### Expert Tip: Training

“Make your training available via mobile, and make it interactive with fun examples, graphics, and gamification where possible. This often means shorter lessons and a running tally of progress. Plus, be sure to localize into the native languages used by the employees of your partners.”



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### 3. Amplify Marketing Through the Channel

Now that you've established a more collaborative, transparent landscape for your partners, you're set up to work together better. Which means you can support their marketing on a new level – helping them build, track, and analyze co-branded campaigns that benefit you both. Extend quick-start tools to enable them to:

- Easily navigate your content, campaigns, and customer journey processes
- Enroll leads in distributed marketing campaigns
- Create co-branded collateral and personalized emails
- Track results

To help your partners market your products more effectively, share AI-driven insights into the most impactful marketing campaigns and content so they can incorporate them into their marketing and selling plans.





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## 4. Make Selling Faster and Easier for Partners

Automating the channel sales process will empower your partners to sell smarter and reduce your channel support costs.

Implement an automated workflow to deliver qualified leads to partners as soon as they come in. Prevent lead conflicts by granting exclusivity to partner-sourced opportunities via a [Deal Registration](#) program.

Chitrala suggests that you “explain to partners that by registering their leads with the manufacturer, they are protected if someone else tries to pursue that business.”

Simplify the quoting process for your partners. Set them up to create quotes quickly by connecting them to your quoting processes and resources, including price books and product catalogs. Highlight special pricing and rebate programs available to them, and display their current rebate progress during the quoting process to motivate additional sales as they approach their rebate goals.

A platform with strong AI will also guide the sale, improving the productivity and impact of employees. “AI can automatically retrieve relevant product and marketing information for partners at appropriate times in the sales cycle,” said Chitrala. “Selling is easier when your sales team is guided by cues like, ‘Here’s the next best step for people who bought this particular item and have this history.’”

Give partners access to accurate, up-to-date information about inventory and delivery schedules. And collaborate with them to track deals. “When deals are registered, you can automatically track them and predict when they will conclude,” Chitrala explains. “That enables you to adjust your production to meet partners’ supply needs, benefiting both parties.”



**Cynthia Turner**  
Director, Industry Solutions,  
Manufacturing

### Expert Tip: Incentive Status Visibility

Make sure your partners always have easy, real-time access to all incentive information instead of providing them quarterly-updated spreadsheets.

“If information is locked into a legacy system and not visible to the dealer or distributor, they are less likely to act on it. But if you put it front and center – if they see they’re a certain dollar amount away from their goal and they have four months left to meet it – you incentivize them to sell more.”

2x

**Partner enablement**  
platforms can increase  
sales goal attainment  
by 2 times.

1.4x

**Revenue can grow**  
1.4 times faster with  
partner enablement  
platforms.

FORRESTER: [It's Time To Enable Your Channel Partners For Evolved Selling](#)



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Supporting partners throughout the sales process delivers tremendous return on investment. A [Forrester study](#) found that companies that provide partners with sales enablement platforms can be more than twice as effective at achieving their sales goals, and grow revenue 1.4 times faster.

Helping your partners close their deals is critical. Again, AI can provide insights to help you focus on the best leads and opportunities to pursue. It can also offer recommendations on the actions that will help most to move them forward.

Finally, when it comes to the overarching sales journey, foster a collaborative business management mindset. Share a dashboard that highlights aggregate partner performance against sales agreement commitments. And keep production aligned with expected demand by jointly updating forecasts regularly.



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## 5. Deliver Excellent Service Experiences to (and through) Your Partner Channel

Success in manufacturing is increasingly driven by the customer experience. Service is a huge component of that experience – perhaps the greatest source of ongoing engagement with customers during the product ownership cycle.

For manufacturers, the imperative is twofold. First, you need to deliver a superior customer experience to partners. Second, you need to support their efforts to deliver the same superior experience to their end customers.

How can you best achieve this two-pronged goal? It starts with giving partners the support they need from any device, at any time, on their own terms. A major component of achieving this involves offering self-service capabilities – which depend in large part on a self-service portal. Such a portal drives service scale, reduces your cost-to-serve, and empowers partners to:

- Answer routine questions through AI-surfaced knowledge articles and FAQs
- Track the status of orders and shipments
- Schedule, change, and cancel service appointments
- Place orders via ecommerce
- Initiate warranty registrations/claims and return merchandise authorization (RMA) processes
- Troubleshoot and resolve technical and other service issues 24/7
- Receive remote virtual support from manufacturer technical support personnel

Partners should be able to easily create cases for customers and themselves. And those cases should be automatically escalated based on priority, keywords, or age of inquiry.

You can even enable partners to connect live with a technician to work through problems. “They just hold up their phone to take a snapshot of the problem and receive real-time remote diagnostics directly through the portal, instead of having to call the manufacturer,” Schmidt explains.



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## 6. Develop Aftermarket Alliances

More of today's manufacturers are providing extended aftermarket services. The standard break-and-fix model is fading away. The future is annual service contracts that provide proactive maintenance and guaranteed uptime. These contracts give customers peace of mind and deliver a reliable source of income to manufacturers.

"Margins in the aftermarket are very high. It tends to be the most profitable business area for manufacturers," notes Schmidt.

Which is to say, selling your products will ultimately be only one part of your partners' job. The other part will be selling ongoing service relationships. In many cases, the partners will be executing the service on your behalf. Which means it's important to help them faithfully represent your brand. Make sure contractors and partner technicians understand expectations and policies to deliver consistent service and ensure service level agreement (SLA) compliance. Manage partner field service technicians through your field service solution just as you would your own employees, providing everyone a view of customer data, job details, asset history, and task lists.



# How Do I Get Started?



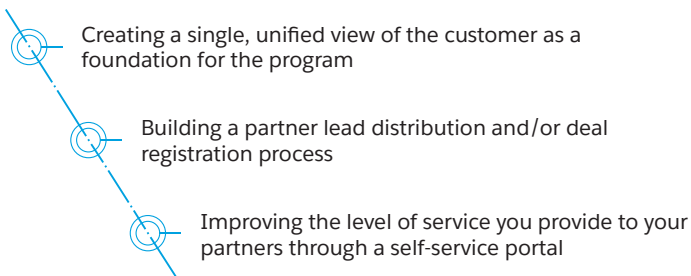
## Being Easy for Partners to Work with Makes Stronger Partnerships

Partners are an invaluable source of income and insights for manufacturers, and modern technology makes it easy for you to enhance collaboration and achieve mutually beneficial goals. When partners have in-depth product information, co-branded marketing materials, and sales tools at their fingertips, they'll sell more of your products with less effort. And they'll steer more business to the manufacturers who helped them more easily achieve their goals.

### What's the First Step?

How do you begin the process of simplifying partner engagement? Each manufacturer may be at a different stage of maturity with respect to your partner program. Some may be starting from scratch, while others may have well-established programs that need to be realigned with evolving business objectives. The journey we've outlined is meant to be flexible based on your business needs.

Start by asking yourself where you should prioritize your time and resources to address your most pressing business needs. It may be one of the following:



Whatever first step you choose, we recommend you start small and build on quick successes. Take the wins from these smaller projects to fuel your next investment, and use this guide as a roadmap for your journey. No matter where you begin, the most important thing is just to get started.

Salesforce is here to help you. In this guide, we described how unifying your data and partner program onto one platform can make it easier for partners to do business with you. [Contact us](#) to learn more about how to simplify partner engagement.

### By the numbers

Manufacturers who have taken steps outlined in this guide are experiencing the [following results](#):

25%

increase in pipeline growth

75%

faster onboarding

<6

less than 6 month payback period

319%

ROI over 3 years



### Take a Closer Look

Find out how Salesforce can help you engage more impactfully with your partners by watching our [demo](#).

